

# Portugal<sup>1</sup>

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**April 2016**

For comparisons with other countries in this review – on demographic, economic, employment and gender equality indicators and on leave provision and early childhood education and care services - go to [cross-country comparisons](#) page on website. To contact authors of country notes, go to [membership-list of members](#) page on website.

**Note on terminology:** a new Labour Law came into effect in May 2009 and major changes were introduced in leave policy (see details in 2009 review). 'Maternity leave' has been replaced by the 'Initial Parental Leave'; 'Paternity leave' and optional Parental leave for fathers has been replaced by 'fathers-only Parental leave' and a 'sharing bonus' was introduced (see below).

## **1. Current leave and other employment-related policies to support parents**

### **a. Initial Parental leave (*licença parental inicial* – formerly 'Maternity leave', see note on terminology) (responsibility of the Ministry of Solidarity and Social Security)**

*Length of leave (before and after birth)*

- One hundred and twenty or 150 calendar days, depending on payment level (see 'payment and funding' below). It is obligatory for the mother to take 42 calendar days (six weeks) following the birth; the remaining period may be divided between parents by mutual agreement. An extra 30 days ('sharing bonus') is available if both parents share the leave". See 'flexibility' below for options available to parents.

*Payment and funding*

- One hundred and twenty days at 100 per cent of earnings or 150 days at 80 per cent of earnings, with no ceiling on payments, if parents do not meet the gender sharing criteria; or 150 days at 100 per cent of earnings or 180 days at 83 per cent of earnings, with no ceiling on payments, if parents meet the gender sharing criteria.
- If parents decide to divide the 30 days of the fifth month of initial parental leave, in order to stay at home simultaneously (each for a maximum of 15 days), payment remains at 80 per cent of earnings for each parent (see flexibility in use point 4).

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<sup>1</sup> Please cite as: Wall, K. and Leitão, M. (2016) 'Portugal country note', in: Koslowski A., Blum S. and Moss P. (eds.) *International Review of Leave Policies and Research 2016*. Available at: [http://www.leavenetwork.org/lp\\_and\\_r\\_reports/](http://www.leavenetwork.org/lp_and_r_reports/)

- Monthly payment corresponds to an average of all gross earnings during the first six months within the last eight months immediately prior to leave. Previously this monthly payment would have included holidays, Christmas or other extra benefits, but as from 2012 the government decided to exclude these benefits from that average. Therefore, now parental benefit corresponds more closely to previous monthly earnings, whereas before it could be significantly above. Nevertheless, while on leave parents continue to receive more than when they are working, since they are exempt from paying taxes (social security contributions and IRS) during the leave period. Parents continue to accrue pension credits and other entitlements during the leave period.
- Parents living in Portuguese islands (Madeira and Azores) are entitled to an uprating of 2 per cent in parental leave benefit.
- When the level of earnings is very low there is a minimum payment of €11.18 per day (social parental benefit, see eligibility).
- Funded by the Social Security system, financed by contributions to social security from employers and employees. The total amount of this contribution is 34.75 per cent of the employee's gross monthly salary. Employers contribute 23.75 per cent and employees 11 per cent. Additionally funded from general taxation for cash benefits where there is no record of contributions or insufficient contributions, e.g. 'social parental benefit' (see 'eligibility').
- Non-employed parents receiving either social parental benefit or unemployment benefit can claim pension credits regarding their leave period; apart from these two situations, non-employed parents are not eligible to paid leave or to pension credits for childrearing.

#### *Flexibility in use*

- Mothers have the option to take up to 30 days of Initial Parental leave before birth; six weeks (42 calendar days) immediately after birth are obligatory for mothers ('mother's-only Initial Parental leave', *licença parental inicial exclusiva da mãe*).
- Initial Parental leave may be taken in the following ways:
  - 1) the mother (or the father, after the mother's obligatory period) may take all 120 days at 100 per cent of earnings or all 150 days at 80 per cent of earnings, i.e. there is no sharing of leave;
  - 2) parents may divide between themselves 150 days at 100 per cent of earnings on condition the father takes at least 30 consecutive days or two periods of 15 consecutive days of leave alone, without the mother, or *vice versa*);
  - 3) parents may divide between themselves 180 days at 83 per cent of earnings on condition the father takes at least 30 consecutive days or two periods of 15 consecutive days of leave alone (without the mother, or *vice versa*);
  - 4) during the fifth month, parents can share a maximum of 30 days in order to stay at home together but each parent can only stay at home with the other parent for a maximum of 15 days. Therefore, this option of staying at home together will imply a shortening of the total amount of leave time, from five to four and a half months, or from six to five and a half months (the latter is for cases where parents meet the gender criteria for sharing, which allows for the bonus).
- When parents want to take leave at the same time and both work for the same employer in a small company, the employer must give his agreement.

- Initial Parental leave of 120 or 150 days can be divided between parents, but cannot be taken at the same time by both parents except in the case just mentioned above: a maximum of 30 days during the fifth month can be divided between the parents (15 days for each), so that they can stay home together.
- Working is not permitted while on paid leave.
- Single parents cannot use the other parent's entitlement.

*Eligibility (e.g. related to employment or family circumstances)*

- All female employees with a record of six months (continuous or intermittent; the latter is only possible if the period without contributions is below six months) of insurance contributions. Mothers who have no record of contributions or insufficient contributions are entitled to a monthly benefit (social parental benefit), but only if their family income is below 80 per cent of the Index of Social Support (€419.22 in 2015). The amount and duration of this benefit is €335 for 120 consecutive days and €268 for 150 consecutive days if parents do not share leave; if parents decide to share leave, benefit is paid at €335 for 150 consecutive days and €276 for 180 consecutive days.
- Father's eligibility to use or to share Initial Parental leave is the same as mothers however it depends on the mother working or being eligible for other reasons (e.g. low family income, unemployment benefit). For example, if the mother is not eligible at all, the working father can only take his Father's-only Parental leave of 15 obligatory and 10 optional working days (see 1b); if the mother works but the father does not and is not eligible for other reasons (e.g. low family income, unemployment benefit) the mother is still eligible for initial parental leave.
- The sharing bonus only applies if both parents work or are eligible for other reasons (e.g. have a low family income, receive unemployment benefit).
- Self-employed workers, who contribute to social security and unemployed women/men receiving unemployment benefit.
- Eligibility does not differ for leave and for benefits.

*Variation in leave due to child or family reasons (e.g. multiple or premature births; poor health or disability of child or mother; lone parent); or delegation of leave to person other than the mother*

- In the case of multiple births, the leave period is extended by one month for every additional child.
- In case of death/mental illness/physical incapacity of the parent who is taking leave at the moment, the other parent is entitled to the (remaining) leave to which the other parent would otherwise be entitled (this is called '*initial parental leave to be taken by one of the parents in case of the other parent's impossibility*'). A minimum of 30 days leave is granted to the father in case of mother's death/mental/physical incapacity.
- A working grandparent is entitled to 30 days leave, following the birth of a grandchild to an adolescent still living at home.
- In cases of poor health or health risks for the mother and child, the pregnant mother is entitled to receive maternity benefits before birth, for as long as the period of risk lasts (this leave is called '*health risk leave during pregnancy*'). This leave does not reduce the 120, 150 or 180 days of Initial Parental leave.

**b. Father's-only Parental leave (*licença parental exclusiva do pai* – formerly Paternity leave, see note on terminology) (responsibility of the Ministry of Solidarity and Social Security)**

#### *Length of leave*

- Twenty five working days, fifteen of which are obligatory and must be taken during the first month after birth.

#### *Payment and funding*

- One hundred per cent of gross earnings with no ceiling.
- Parents living in Portuguese islands (Madeira and Azores) are entitled to an uprating of 2 per cent in parental leave benefit.
- Non-employed parents receiving either social parental benefit or unemployment benefit can claim pension credits regarding their leave period; except for these two situations, non-employed parents are not eligible either to leave, payment or pension credits for childrearing.

#### *Flexibility in use*

- Five of the fifteen obligatory days must be taken consecutively immediately after birth; the other ten days must be taken during the first month after birth; the other ten optional days must be taken while the mother is on Initial Parental leave.

#### *Eligibility (e.g. related to employment or family circumstances)*

- As Initial Parental leave. Fathers who have no record of, or insufficient contributions are entitled to the obligatory paid leave of fifteen working days as well as to the ten optional working days; daily payment corresponds to 80 per cent of 1/30 of IAS (the IAS is €419.22 per month).

*Variation in leave due to child or family reasons (e.g. multiple or premature births; poor health or disability of child or mother; lone parent); or delegation of leave to person other than the father*

- The fifteen obligatory days will be increased by two days for every additional child in case of multiple births; the same for the ten optional days which the father can take, while the mother is on Initial Parental leave.

### **c. Additional Parental leave (*licença parental complementar* – formerly Parental leave, see note on terminology) (responsibility of the Ministry of Solidarity and Social Security)**

#### *Length of leave*

- Three months per parent. Leave is an individual entitlement.

#### *Payment and funding*

- Twenty-five per cent of average earnings for three months for each parent, but only if taken immediately after the Initial Parental leave. Parents living in Portuguese islands (Madeira and Azores) are entitled to an uprating of 2 per cent in parental leave benefit.
- Non-employed parents receiving either social parental benefit or unemployment benefit can claim pension credits regarding their leave period;

except for these two situations, non-employed parents are not eligible either to leave, payment or pension credits for childrearing.

#### *Flexibility in use*

- Leave may be taken up to the child's sixth birthday.
- Leave can be taken in the following ways: a) on a full-time basis for three months; b) on a half-time basis for a period of 12 months per parent; or c) on an alternating basis (i.e. working half-time or full-time up to a maximum of three months full-time equivalent per parent).
- If the three months are taken as unpaid Parental leave, they can be taken by both parents at same time; but paid leave can only be taken by one parent at a time.
- However, when both parents work for the same employer, the employer has a right to postpone the leave of one of the parents.

#### *Eligibility (e.g. related to employment or family circumstances)*

- As Initial Parental leave.

*Variation in leave due to child or family reasons (e.g. multiple or premature births; poor health or disability of child or mother; lone parent); or delegation of leave to person other than the parents*

- None.

*Additional note (e.g. if leave payments are often supplemented by collective agreements; employer exclusions or rights to postpone)*

- If the three months are taken as unpaid Parental leave, they can be taken by both parents at same time. However, when both parents work for the same employer, the employer has a right to postpone the leave of one of the parents.

#### **d. Childcare leave or career breaks**

- After Additional Parental leave, and only if this leave has been taken, one of the parents may take up to two years of Childcare leave (*licença para assistência a filho* – formerly known as Special Parental leave) on a full-time basis, extended to three years when there is a third or subsequent child. The leave is unpaid. However, unlike Additional Parental leave, which is an individual entitlement, this special leave can only be taken by one parent who must prove that the other partner is employed or incapable of working. Moreover, while parents on Additional Parental leave continue to be considered as employees with full rights and guarantees, as if they were working (for example, they continue to be entitled to holidays which they can take at the end of the leave period), in the case of Childcare leave (and of Leave to care for handicapped or chronically ill children), there is a suspension of the work contract; this means that all of the employee's rights and guarantees are suspended, but the right to return to his/her job is safeguarded. The period of childcare leave is also taken into account in the calculation of old age and invalidity pensions. Non-employed parents are not eligible either to leave, payment or pension credits.

#### **e. Other employment-related measures**

### *Adoption leave and pay*

- In cases of adoption of a child less than 15 years old, the adopting parent is entitled to leave on the same conditions (length and payment, including the sharing bonus) as for Initial Parental leave. If there are two adopting parents, the leave may be divided between them. In case of multiple adoptions leave will be extended by 30 days for every subsequent child adopted. In case of death of the adopting parent, leave may be transferred to the spouse, who can take as an alternative, a minimum of 14 days leave.

### *Time off for the care of dependants*

- Up to 30 days per year can be taken to care for sick children under the age of 12 years, with no age limit in the case of a child who is chronically ill or disabled; an additional 15 days per year can be taken to care for a sick child above the age of 12 (if older than 18 years, the child must belong to same household). This is a family entitlement to be divided between parents as they choose, and is paid at 65 per cent of earnings. Both entitlements are increased by one day for every second and subsequent child. If a child under the age of 12 is in hospital care, this entitlement lasts for as long as the child is in hospital.
- Up to 15 days unpaid leave per year to care for a spouse or a close relative (parents, grandparents, siblings, even if not living in the same household). Employees in the public sector are entitled to five-sixths of their earnings.
- An extra 15 days unpaid leave per year to care for a severely handicapped or chronically ill spouse.
- Grandparents are also entitled to take leave from work in order to substitute parents in caring for sick children; they may take the same number of days parents are entitled to or take the remaining days that parents have not taken from their leave entitlement.
- When there is a severely handicapped or chronically ill child, including adopted children and living-in stepchildren, one of the parents is entitled to six months leave (*licença para assistência a filho com deficiência ou doença crónica – leave to care for a handicapped or chronically ill child*), which may be extended to four years. This leave can only be taken by one of the parents and it is paid at 65 per cent of earnings; the maximum payment per month is equivalent to two times the amount of IAS (€838.44). Parents living in Portuguese islands (Madeira and Azores) are entitled to an uprating of 2 per cent.

### *Flexible working*

- Parents are entitled to two hours 'nursing' leave per day during the first year after birth, with no reduction of earnings (*dispensa para amamentação e aleitação – leave to breastfeed or to feed*). These two hours of nursing leave can be a family entitlement if mothers do not breastfeed their child. In this case, leave may be taken by one parent, either the mother or the father, usually in two different periods: one hour in the morning and one hour in the afternoon (unless negotiated otherwise with the employer). Parents may also share the nursing leave by taking one hour each per day. In cases of multiple births, leave is increased by 30 minutes for every child. Where mothers are actually breastfeeding, the two hours' reduction can last for as long as the child is breastfed.

- If there is a handicapped or chronically ill child below one year of age, one of the parents may also apply for a five-hour reduction in the working week, as long as the other parent is employed.
- Parents are entitled to four hours leave per school term to go to their children's school until children reach 18 years of age, with no reduction of earnings.
- Adopting parents are entitled to miss work (up to three times) in order to be present at meetings related to the adoption.
- Fathers are entitled to leave work (up to three times) to accompany their spouses in pre-natal appointments.
- Parents with children below 12 years (no age limit in the case of a child who is chronically ill or disabled living in the same household) are entitled to 'flexible working' which means that the employee may choose, within certain limits, when to start and finish daily work. Employees may work up to six consecutive hours and up to ten hours daily as long as the normal weekly hours of work are fulfilled. Both parents are entitled to this 'flexible working schedule for an employee with family responsibilities'.
- Also where there are children below 12 years (no age limit in case of a child who is chronically ill or disabled living in the same household), one of the parents (or both for alternative periods of time) is entitled to half-time work after taking Additional Parental leave ('half-time work for an employee with family responsibilities'). Half-time work can be taken on the following basis: working half-time during five days a week or working three full days per week. Employers and employees can agree on another basis. Half-time work may be extended up to two years (three years in the case of third and subsequent child, four years in the case of chronically ill or disabled child).
- Parents working half-time or in a flexible working regime, cannot be penalized in their evaluation and career progression.
- Parents with children below 3 years of age are entitled to teleworking (working from home). If their function fits this working regime and the company has resources, employers cannot oppose this option.

## **2. Relationship between leave policy and early childhood education and care policy**

The maximum period of total post-natal leave available in Portugal is three years (including two years of unpaid 'childcare leave' and six months at 25 per cent of previous earnings). Leave paid at a high rate lasts for up to six months, depending on the gender sharing of leave. Since 2009, there is an entitlement to ECEC from five years of age, in nursery education available for eight hours a day. So there is a gap of around two years between the end of leave and an ECEC entitlement, and of 4½ years between the end of well-paid leave and an ECEC entitlement. Levels of attendance at formal services for children under three years are above the average for the countries included in this review and for OECD countries; and around average for children over three years. For actual attendance levels, see 'relationship between leave and ECEC entitlements' on [cross-country comparisons](#) page.

## **3. Changes in policy since April 2015 (including proposals currently under discussion)**

In 2014, there were no changes in the leave scheme but there was a major debate on the persistence of low fertility (down from 101,381 births in 2010 to 96,856 in 2011; 89,841 in 2012 to 82,787 in 2013 and to 82,367 in 2014). As president of the

Social Democrat Party, the Prime-Minister<sup>2</sup> decided to request an independent commission to elaborate a wide study on fertility promotion in order to have a basis for a national plan on this subject. Results were reported in 2014 and the main proposals were focused on family benefits and tax deductions, work and family life reconciliation and parental leaves. In what concerns the latter, the report proposes: full salary replacement of mothers' half-time work one year after parental leave (mothers would be replaced by an unemployed person receiving unemployment benefit, so that mother and company would not have further salary costs; the state would pay 50 per cent of salary to the mother, and the company would pay the unemployed person half of the mother's salary); daily work reduction (between two to four hours) either for the mother or father up to the child's six birthday, with a minimum paid at 50 per cent of salary flexible and simultaneous share of parental leave on a half-time basis (e.g. each one of the parents works 20 hours per week, while the other is on leave).

Regarding crèches and pre-school services, the report highlights the importance of flexible timetables adapted to parents' work schedules, and creating more after-school clubs and activities during holidays periods, while also defending half-time crèche timetables and prices (which do not exist in Portugal or at least are not common), as well as a maximum daily hours' period for children under three years. The report was considered by opposition parties as suggesting good proposals but also as relating to a more traditional vision of family and work-life based on mothers' half-time work and their primary role in childrearing, thus defending the dual-earner female half-time role.

In September 2015, one month before national government elections, some changes were introduced by the government regarding the leave scheme, alongside other employment related measures (Law nº 120/2015):

- a. The obligatory "father's-only parental leave" was increased from 10 to 15 working days. However, this change was subject to the approval of the state budget which only came into effect in March 2016 under the new government (coalition government with the socialist party supported by two left-wing parties) which took over after the October elections.
- b. Other measures approved by the former centre right wing coalition include:
  - a) giving parents the option to take Initial Parental leave together during the fifth month of leave, so that each parent can stay home together with the other parent for a maximum of 15 days. This change does not represent any additional cost for the state since the fifth month is split between both parents with the same 80 per cent of replacement;
  - b) parents with children under the age of twelve, working half-time or in "flexible working" regimes, must not be penalized in their career evaluation and progression; parents with children under the age of three are entitled to teleworking, depending on job compatibility and company resources; parents with children under three are also exempted from adaptability work and bank hours (an extra four hours per day, up to a maximum of sixty hours per week), if they do not state their agreement in writing.

Meanwhile in November 2015, a public petition was submitted to parliament defending six months of maternity leave for mothers, in accordance with World Health Organization recommendations concerning exclusive breastfeeding for at least six months. This online petition was initially led by one mother, but soon got

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<sup>2</sup> The government elected in June 2011 has a majority in Parliament due to a centre-right wing coalition.



thousands of signatures. It is currently under discussion side-by-side with other ongoing proposals from three left-wing political parties (BE, PCP-PEV and PAN), which also support mothers' and babies' rights to exclusive breastfeeding for six months. Among their several proposals the following are highlighted:

- a) A first proposal supports 150 days of initial parental leave paid at 100 per cent (currently paid at 80 per cent or at 100 in case of gender sharing) or 180 days at 80 per cent independently of gender sharing (currently paid at 80 per cent, but only in case of gender sharing); 180 days paid at 100 per cent or 210 days paid at 83 per cent in case of gender sharing (BE).
- b) Another proposal supports the extension of mothers' only obligatory leave from 6 to 9 weeks; of fathers' only leave up to 60 days (30 obligatory and 30 optional); initial parental leave up to 180 days paid at 100 per cent (if mother only) or up to 210 days paid at 100 per cent if the father takes his optional 30 days of leave after the mother; it also asks for a new leave in case of premature babies or new-born internment (PCP-PEV).
- c) A third proposal claims a gradual increase of initial parental leave in order to achieve a one year leave in 2021: 183 days paid at 100 per cent in 2016 which will increase to 274 days paid at 80 per cent as from 2019 and to 365 days paid at 60 per cent as from 2021. Leave could be shared or taken simultaneously by both, according to parents' decision. It also proposes an increase in "father's only parental leave": 20 compulsory working days, ten of which immediately after birth, plus 15 optional days to take while the mother is on leave (PAN).

Work and family reconciliation is also on the agenda, and one of the proposals is the extension of the two hours' reduction per day up until the child's second birthday (currently it is up to the child's first year) (BE). Another proposal comes from the Medical Order, which has recently announced that it intends to create a public petition regarding the daily work-time reduction up to the child's third birthday, which could be claimed by one of the parents, independently of breastfeeding. In July 2015, the former centre-right wing coalition government approved the universal entitlement to ECEC for children from four years of age (currently five years of age) as from 2016. In April 2016, the new government announced that universal entitlement would be from three years of age from 2020.

There are no definitive figures on the number of births for 2015 but there is an estimation of a slight increase for the first time in the last five years (about 85,500 births in comparison to 82,367 in 2014). However this will have no impact on the fertility rate, which is expected to be one of the lowest in Europe, as well as in the rest of the world.

## **4. Take-up of leave**

### **a. Initial Parental Leave (formerly maternity leave)**

After decreasing for the last four years (down from 81,176 in 2011 to 75,590 in 2012; then from 69,531 in 2013 to 67,168 in 2014), the total number of paid Initial Parental leaves has increased to 72,402 in 2015. These figures include: mothers and fathers with a sufficient record of social security contributions entitled to 80-100 per cent of earnings compensation (58,019); as well as mothers and fathers with no record or an insufficient record of social security contributions (14,383), who are only entitled to a flat-rate benefit (see 1a for benefit eligibility). The latter represented 19.9 per cent of the total number of paid Initial Parental leaves in 2015. Until 2014 there has been a

slight decrease in the number of parents claiming this flat-rate benefit, firstly introduced in 2008 (16,887 in 2010, 16,378 in 2011, 15,887 in 2012, 14,651 in 2013 and 14,190 in 2014). This is mainly due to some eligibility restrictions introduced in November 2010. In 2015, social parental benefit slightly increased to 14,383.

In 2015, Parental leave benefit taken by mothers and fathers with a sufficient record of social security contributions (entitled to 80-100) represents about 67.9 per cent, in relation to total number of births. In what concerns the flat-rate parental benefit (mothers and fathers with no record or an insufficient record of social security contributions) it represents about 16.8 per cent in relation to total of births. All in all, 84.7 per cent of mothers/fathers were eligible to parental benefit in 2015.

## **b. Initial Parental Leave and Sharing Bonus**

Since it came into effect in May 2009, data on the sharing bonus shows a strong initial increase in take-up in 2009 and 2010 (from 596 fathers who shared Maternity leave in 2008 to 16,426 fathers sharing Initial Parental leave in 2010). After this initial period, there has been a slow but steady increase in the take-up of the sharing bonus: 17,036 fathers staying on their own for 30 or more days during the five or six months of Initial Parental leave in 2011; 17,744 parents in 2014 and 20,941 in 2015. Put another way, in 2015, 28.9 of Initial Parental Leaves were taken with the sharing bonus (meaning that the father took at least 30 days of leave alone, without the mother, or *vice versa*), compared with 26.4 in 2014 and 20.1 in 2011.

Initial Parental leave taken with the sharing bonus has to be shared between both parents. Although only the first six weeks have to be taken by the mother, in practice nearly all parents divide the leave between themselves by allocating four or five months to the mother and one month (the last month of Initial Parental leave, when the mother goes back to work) to the father. Among these couples, in 2015, 65.3 per cent (13,682) chose the longer leave period (six months paid at 83 per cent of earnings), compared to 58 per cent in 2010; while 34.7 per cent (7,259) preferred the five months' option paid at 100 per cent of earnings. This would seem to indicate that parents are choosing to stretch the period of leave to six months even if they receive a slightly lower level of earnings compensation. By contrast, parents receiving social parental benefit still tend to share the shorter period of five months.

Initial Parental leave taken without the gender sharing bonus is nearly all taken by mothers, with half of the leave taken for a period of four months (49.3 per cent) and the other half for five months (50.7 per cent). However, there is a difference between mothers receiving parental benefit and mothers receiving social parental benefit (see 1a); the latter tend to opt for the four months period (87 per cent), while the others mainly take the five months period.

## **c. Father's-only parental leave (formerly Paternity leave)**

Since 2002 there has been a steady increase in the take-up of Paternity leave. The five day Paternity leave (introduced in 1999 and made obligatory in 2004) was used in 2000 by 11 per cent of fathers, increasing to 27 per cent in 2002 and to 36 per cent in 2003. The proportion of fathers who took Paternity leave then increased by about two per cent per year: 37 per cent in 2004, 39 per cent in 2005, 41 per cent in 2006, 45 per cent in 2007 and 2008. These percentages are based on the number of fathers who take leave in relation to the number of births; but in relation to the number of women eligible for Maternity leave, the proportion of fathers taking five days Paternity leave had increased to 62 per cent in 2008. It should also be noted

that take-up is underestimated as these statistics exclude employees with special social protection regimes (e.g. civil servants, bank workers).

The same trends may be observed for the 15 additional Paternity leave days (the optional 'Daddy days' introduced in 1999). In 2001 only four per cent of fathers chose to take the 15 days and this increased to 14 per cent in 2002 and to 24 per cent in 2003. Since then, and up until the 2009 policy reform, take-up rates increased steadily: to 28 per cent in 2004, 30 per cent in 2005, 33 per cent in 2006, 37 per cent in 2007 and 2008. In 2009, when Paternity leave became Father-only Parental leave and ten days became obligatory, take-up of leave increased to 56 per cent for the ten compulsory days and 47 per cent for the additional ten days. Take-up of the obligatory leave is not at 100 per cent for two main reasons: statistics exclude employees with special social protection regimes (e.g. civil servants, bank workers) and the labour inspection services only recently began to control take-up of leave by fathers (making for lack of implementation by some employers). Until 2011, take-up increased steadily. Between 2012 and 2014 there were no increases in take-up, while births were also decreasing. In 2015, there was an increase in father's only parental leave which might be mainly related to an increase in birth rate. In 2015, there is an estimation of 71 per cent of fathers using the ten obligatory days and 62 per cent of fathers taking the ten optional days; in 2014, the proportions were 68 per cent and 59 per cent, respectively.

These percentages are based on the number of fathers who take leave in relation to the number of births. If again, take-up is calculated in relation to the total number of Initial Parental leaves granted, then the estimate proportions in 2015 increased to 84 per cent for the ten obligatory days, and to 74 per cent for the ten optional days.

#### **d. Additional Parental leave (formerly Parental leave)**

Take-up of Additional Parental leave is still low, even if it has increased since a new payment was introduced in 2009 (at 25 per cent of average earnings, if taken immediately after the Initial Parental Leave). In 2009, only 1,251 parents took paid 'Additional Parental leave', more women (804 mothers, 66 per cent of the total) than men (411 fathers, 34 per cent). In 2015, 4,944 parents took this leave (in comparison with 3,315 parents in 2014, 2,447 in 2013 and 2,253 in 2012) which represents about 7 per cent of all parents who were granted Initial Parental Leave. It is mainly taken by mothers (4,406) in comparison with fathers (538).

### **5. Research and publications on leave and other employment-related policies since April 2015**

#### **a. General overview**

None reported.

#### **b. Selected publications since April 2015**

Escobedo, A and Wall, K. (2015) Leave policies in southern Europe: continuities and changes. *Community, Work and Family*, vol. 18(2): 218-235.

This article addresses the challenge of reviewing Southern European welfare states by analysing how developments in leave policies are generating common or divergent trends across Portugal, Spain, Italy and Greece. These societies offer a mixture of family patterns and family policies. Over the last decade they have

developed significant work–family arrangements both in terms of parental leave and early education childcare services. The four countries have been moving in the direction of longer paid leave and the promotion of paternal leave, allowing for family diversity and new gender-equality incentives. Besides these common trends, the four countries also reveal differences enabling them to shift towards alternative leave models, such as the one-year gender-equality-oriented model or the choice-oriented leave model. However, for the time being, taking into account take-up rates and the impact of the economic crisis, the four countries conform to what we have characterised as an ‘extensible early return to work’ leave model. Leave policies are reviewed in Greece, Italy, Portugal and Spain mainly between 2004 and 2014, drawing on data from the Annual Reviews of the Leave Policies and Research Network, Eurostat and the OECD Family Database.

Wall, K. (ed.) (2016) *Relatório 2014-15 do OFAP - Observatório das Famílias e das Políticas de Família [Annual Report 2016 of The Observatory of Families and Family Policies]*. Lisbon: ICS and CIES. Available at: [www.observatoriofamilias.ics.ul.pt](http://www.observatoriofamilias.ics.ul.pt)  
This report maps changing family forms and analyses developments in family policies in Portugal, in 2014 and 2015.

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### **c. Ongoing research**

*The double postponement: men and women coping with childbearing intentions in their late 30s and early 40s* (2012-2015). Vanessa Cunha (coordinator), ICS University of Lisbon, Filomena Mendes, University of Evora.

Funded by the National Foundation for Science and Technology. This research project intends to produce a further questioning in relation to childbearing intentions within the framework of contemporary postponement and decision-making processes, and specifically regarding the transitions to the first and the second child in cohorts that are coming close to the end of reproductive life. There are three aims that will be pursued within a life course perspective: to identify the mechanisms that are engendering those postponements and how they entail coping with and reshaping childbearing intentions throughout the life course; to understand the chain of decision-making processes that triggers the childbearing postponement, and the resulting balance of gains and costs for one's life; and to clarify if the gender gap concerning the childbearing agenda turns into a gender trap by jeopardizing childbearing intentions of one or both. The research relies on two methodological approaches: a qualitative one based on in-depth interviews with men and women aged between 35 and 45, in order to understand how they cope with the transitions

to the first and second child; and a quantitative one, regarding the analysis of data from the Census 2011 and 2001, to portray the current demographic trends concerning postponement, childlessness and one-child families in Portugal, outlining major changes in a period of a decade. Contact: Vanessa Cunha at [Vanessa.cunha@ics.ul.pt](mailto:Vanessa.cunha@ics.ul.pt)

*Network on fathers on leave alone and gender equality* (2013-2015). Karin Wall (coordinator), ICS, University of Lisbon.

Drawing on the above project ('Changes in Parental leaves and their impact on men's experiences of leave') in Portugal, a small network of researchers from the international leave network (Spain, U.K., Sweden, Finland, Norway, Iceland, France, Switzerland, Canada, Portugal, Japan) are carrying out similar in-depth interviews in order to provide a comparative cross-national analysis of the impact of leave taken up by fathers, in a solo manner, on gender equality and family life. A Book (edited by Margaret O'Brien and Karin Wall) will be published in the Springer Life Course Series in 2016: "Comparative perspectives on work-life balance and gender equality: fathers on leave alone" Contact: Karin Wall at [karin.wall@ics.ulisboa.pt](mailto:karin.wall@ics.ulisboa.pt)

*Changes in Parental leaves and their impact on men's experiences of leave* (2012-2016). Karin Wall (Coordinator), Sofia Marinho and Mafalda Leitão. ICS, University of Lisbon. Funded by EEA Grants Programme Area 14 (mainstreaming gender equality and promoting work-life balance).

This qualitative research project draws on in-depth interviews with fathers who took up the sharing bonus introduced in the 2009 leave policy reform. The project is part of a wider project on Men's Roles in a Gender Equality Perspective as from February 2014 (to 2016).

*Sharing and negotiating Parental Leave: the father, mother and employers' perspectives* (2013-2017). Mafalda Leitão, doctoral study at Instituto de Ciências Sociais [Institute of Social Sciences], University of Lisbon (2013-2017).

*(IM)BALANCE: Impact of Work-Family Conciliation on Parenting and Children's Development* (on-going). Paula Mena Matos, Faculty of Psychology and Education Sciences, University of Porto. Contact: [pmmatos@fpce.up.pt](mailto:pmmatos@fpce.up.pt)

*Co-parenting reconfigurations after breakups: negotiation dynamics and public policies on shared parenting responsibilities* (on-going). Sofia Pappámikail Marinho, Institute of Social Sciences, University of Lisbon. Contact: [sofia.marinho@ics.ul.pt](mailto:sofia.marinho@ics.ul.pt)  
<http://www.ics.ul.pt/instituto/?ln=p&pid=222&mm=6&ctmid=2&mnid=1&doc=31809901190&sec=5>.

*Work-Family balance and couple's emotional dynamics* (on-going). Marisa Matias, Faculty of Psychology and Education Sciences, University of Porto. Contact: [marisa@fpce.up.pt](mailto:marisa@fpce.up.pt)  
<http://www.fpce.up.pt/cpup/english/index.html>.

*Intentions to have children: does work-family balance play a role?* (on-going) Margarida Lacerda, Marisa Matias, Faculty of Psychology and Education Sciences, University of Porto. Contact: [marisa@fpce.up.pt](mailto:marisa@fpce.up.pt)

*(Co)Balance of work and family: Multiple roles impact in parenting* (on-going) Joana Vieira, Paula Mena Matos, Frederick Lopez, Faculty of Psychology and Education Sciences, University of Porto. Contact: [pmmatos@fpce.up.pt](mailto:pmmatos@fpce.up.pt)